



UNITED STATES PATENT AND TRADEMARK OFFICE

UNITED STATES DEPARTMENT OF COMMERCE
 United States Patent and Trademark Office
 Address: COMMISSIONER FOR PATENTS
 P.O. Box 1450
 Alexandria, Virginia 22313-1450
 www.uspto.gov

BIB DATA SHEET

CONFIRMATION NO. 1462

SERIAL NUMBER 10/034,872	FILING or 371(c) DATE 12/28/2001 RULE	CLASS 705	GROUP ART UNIT 3692	ATTORNEY DOCKET NO.	
APPLICANTS W. Richard Purcell, JR., Boulder, CO; ** CONTINUING DATA ***** ** FOREIGN APPLICATIONS ***** ** IF REQUIRED, FOREIGN FILING LICENSE GRANTED ** * SMALL ENTITY ** 01/31/2002					
Foreign Priority claimed <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 35 USC 119(a-d) conditions met <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Verified and /CLEMENT B GRAHAM/ Acknowledged Examiner's Signature	<input type="checkbox"/> Met after Allowance Initials	STATE OR COUNTRY CO	SHEETS DRAWINGS 45	TOTAL CLAIMS 74	INDEPENDENT CLAIMS 2
ADDRESS W. Richard Purcell, Jr. 810 S. Lashley Boulder, CO 80305 UNITED STATES					
TITLE Method and apparatus for optimizing investment portfolio plans for long-term financial plans and goals					
FILING FEE RECEIVED 856	FEES: Authority has been given in Paper No. _____ to charge/credit DEPOSIT ACCOUNT No. _____ for following:		<input type="checkbox"/> All Fees <input type="checkbox"/> 1.16 Fees (Filing) <input type="checkbox"/> 1.17 Fees (Processing Ext. of time) <input type="checkbox"/> 1.18 Fees (Issue) <input type="checkbox"/> Other _____ <input type="checkbox"/> Credit		